

**CalPERS EFFECTIVENESS MEASURES**  
**Benefit Services Division (BNSD)**

**4th QUARTER**  
**FISCAL YEAR 2005-2006**

**SERVICE RETIREMENTS**

For the fiscal year, service retirements were paid within the approved service level goal at an average 99% of first retirement payments made within 30 calendar days of effective date for applications without constraints. Constraints are factors out of CalPERS' control which delay processing of an application. The most common constraint is members who apply for retirement less than 30 days before the requested retirement date. Approximately 4% of applications face constraints each year. Performance for applications with constraints averaged 59% within 90 days of retirement date.

At 91%, annual performance in retirement adjustments fell short of the baseline due to an emphasis on clearing older cases on hand.

**DISABILITY RETIREMENTS**

For disability retirement payments, performance neared the baseline at 67%. Performance on Disability Validation Team surveillance and investigative reports surpassed the baseline at 96%. Annual performance of 43% of Disability Validation Team determinations and 24% of all other disability retirement determinations made within 30 days of receipt of all information did not reach the baselines of 90% and 70%, respectively, within 6 months of receipt of the application. During completion of the RADAR backlog project, we focused on the oldest applications as reflected in performance well below the desired baselines.

**POST RETIRED DEATH BENEFIT CLAIMS**

At 93%, service level performance for post-retirement death benefits approached the goal of 95% of claims paid within 90 days of notification of death.

**PRE RETIREMENT DEATH BENEFIT CLAIMS**

For pre-retirement death benefit payments, performance (61%) fell short of the baseline by 14%. Although benefit information and forms were provided timely to the survivor, the completed application and other required documents were not received by CalPERS in sufficient time to pay 75% of the cases within 90 calendar days of the death notification.

**REFUNDS**

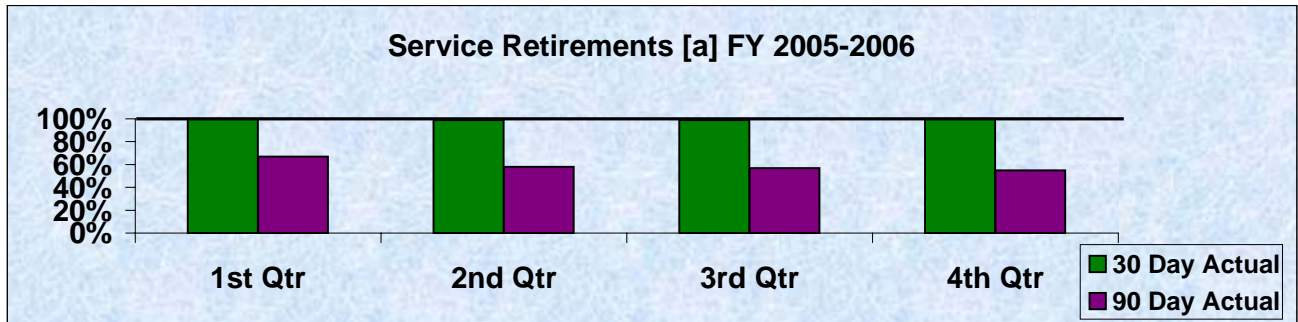
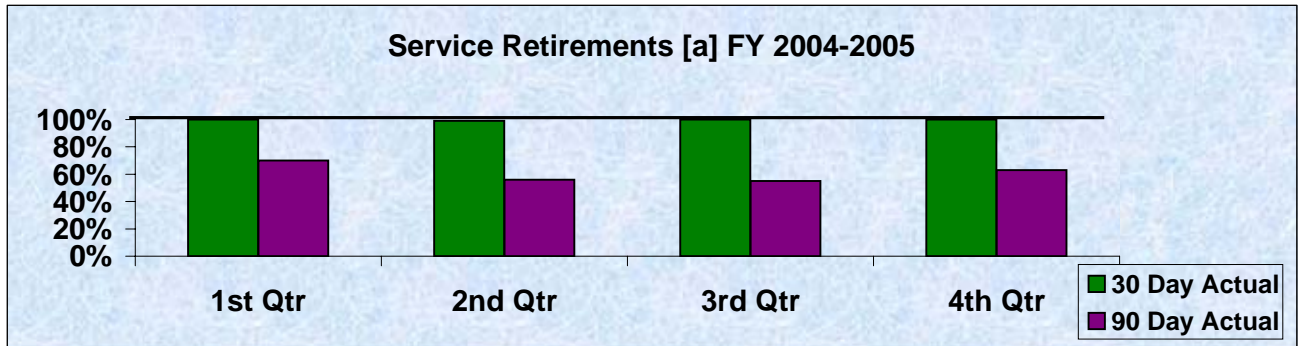
Effectiveness consistently reaches 100% for refunds.

**CALPERS EFFECTIVENESS MEASURES  
SERVICE RETIREMENTS**

Title: **Service Retirements [a]**

Definition: Make first payment within 30 calendar days of retirement effective date, for **100%** of applicants without constraints.

Definition: Make first payment within 90 calendar days of retirement effective date, for **100%** of applicants with constraints.



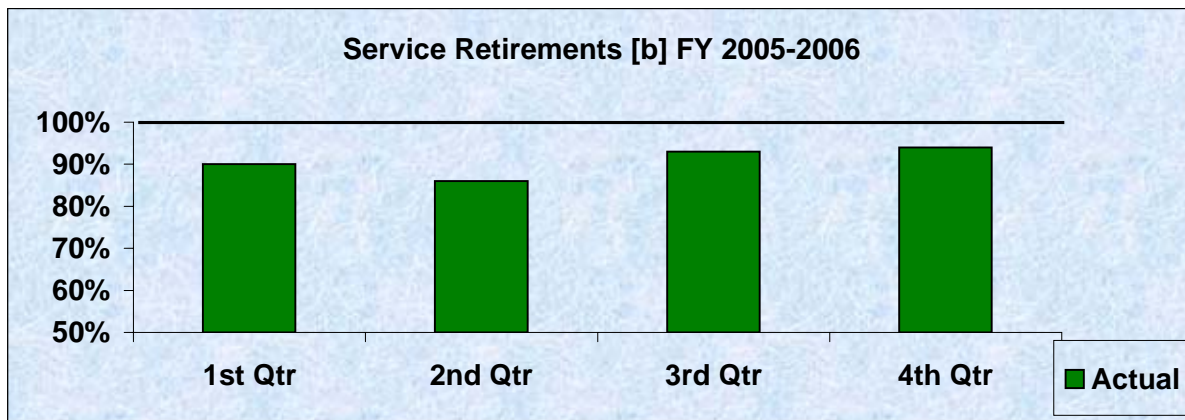
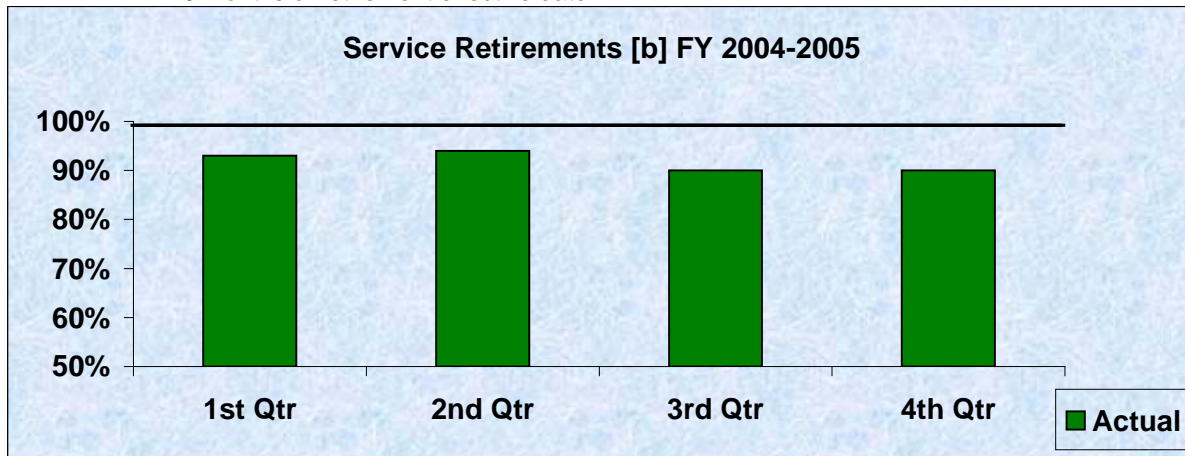
FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2004-2005	30 Day Actual	100%	99%	100%	100%	100%
	90 Day Actual	70%	56%	55%	63%	61%
2005-2006	30 Day Actual	100%	99%	99%	100%	99%
	90 Day Actual	67%	58%	57%	55%	59%
	Baseline	100%	100%	100%	100%	100%

FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2004-2005	Paid in 30 Days	9877	4565	7221	4408	6518
	Total	9897	4596	7249	4426	6542
	Paid in 90 Days	287	227	217	228	240
	Total	408	404	398	364	394
	Combined	10164	4792	7438	4636	6758
	Total	10305	5000	7647	4790	6936
2005-2006	Paid in 30 Days	7968	4643	7404	4561	6144
	Total	7988	4669	7442	4578	6169
	Paid in 90 Days	318	267	290	205	270
	Total	476	458	505	373	453
	Combined	8286	4910	7694	4766	6414
	Total	8464	5127	7947	4951	6622

**CALPERS EFFECTIVENESS MEASURES**  
**SERVICE RETIREMENTS**

Title: **Service Retirements [b]**

Definition: Complete **100%** of final adjustments to service retirement benefits within 9 months of retirement effective date.



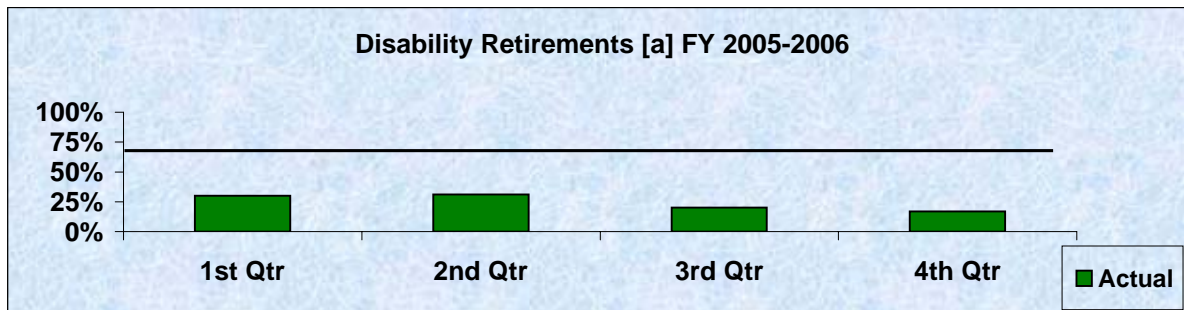
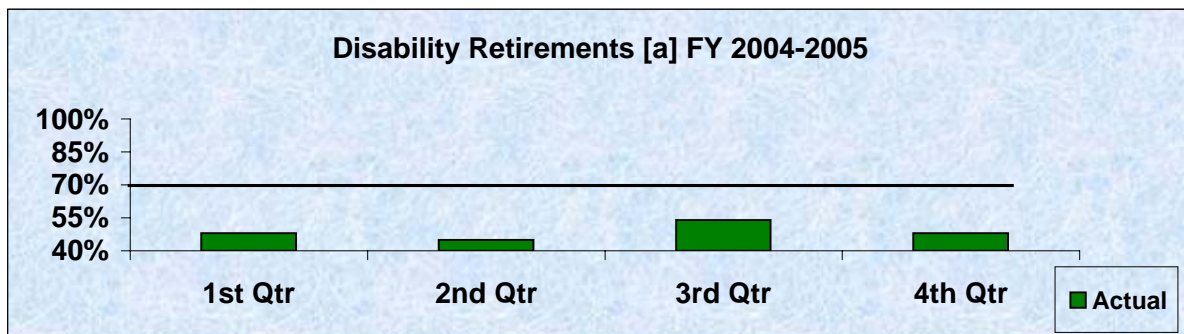
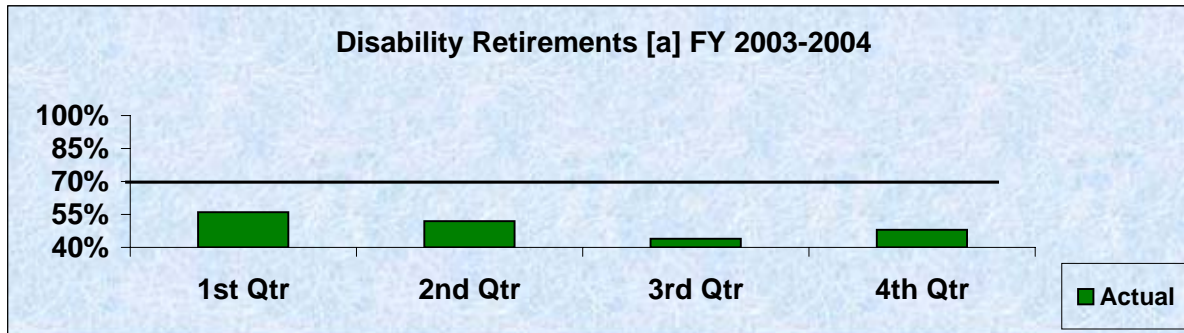
FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2004-2005	Actual	93%	94%	90%	90%	92%
	Baseline	100%	100%	100%	100%	100%
2005-2006	Actual	90%	86%	93%	94%	91%
	Baseline	100%	100%	100%	100%	100%

FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2004-2005	Com. Adj.	4386	4490	3952	2735	3891
	Tot. Adj.	4717	4777	4398	3063	4239
2005-2006	Com. Adj.	3407	3308	3632	3448	3449
	Tot. Adj.	3802	3826	3913	3659	3800

**CALPERS EFFECTIVENESS MEASURES  
THREE YEAR COMPARISONS  
DISABILITY RETIREMENTS**

Title: **Disability Retirements [a]**

Definition: Make determinations regarding approval or disapproval within 6 months of receipt of applications for **70%** of applicants.



FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Actual	56%	52%	44%	48%	50%
2004-2005	Actual	48%	45%	54%	48%	49%
2005-2006	Actual	30%	31%	20%	17%	24%
	Baseline	70%	70%	70%	70%	70%

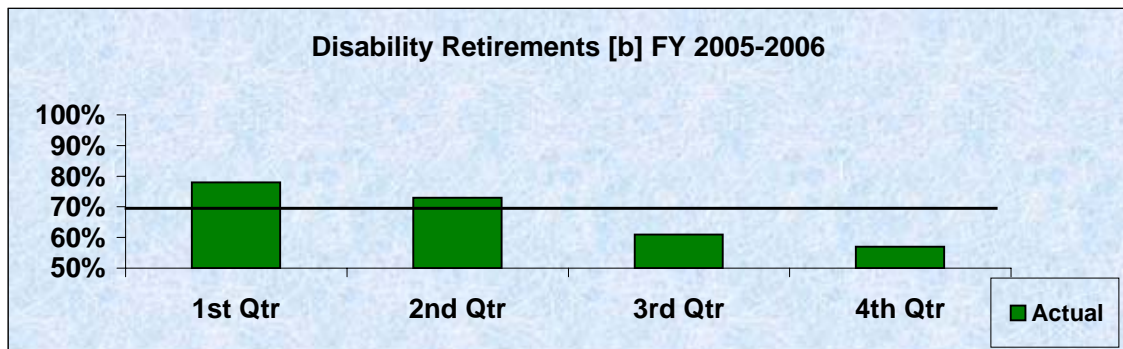
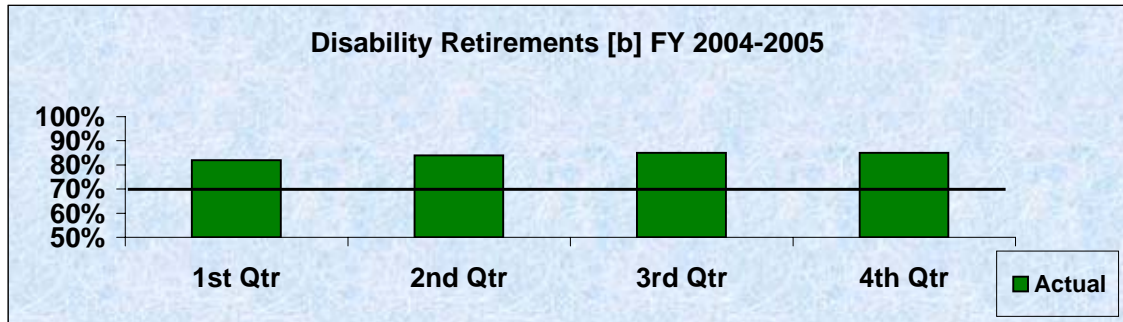
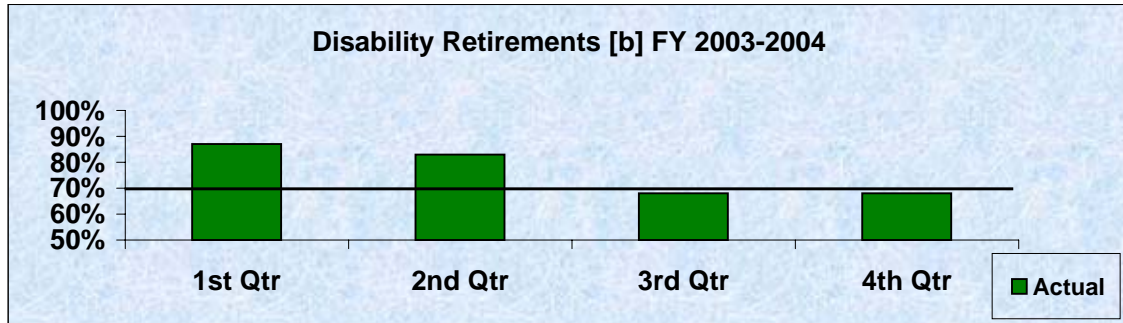
FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Made	493	417	413	367	423
	Total	882	799	947	772	850
2004-2005	Made	410	303	173	180	267
	Total	850	668	322	379	555
2005-2006	Made	122	126	192	360	200
	Total	411	408	943	2093	964



**CALPERS EFFECTIVENESS MEASURES  
THREE YEAR COMPARISONS  
DISABILITY RETIREMENTS**

**Title:** Disability Retirements [b]

**Definition:** Make first payment within 6 months of retirement effective date for 70% of applicants.



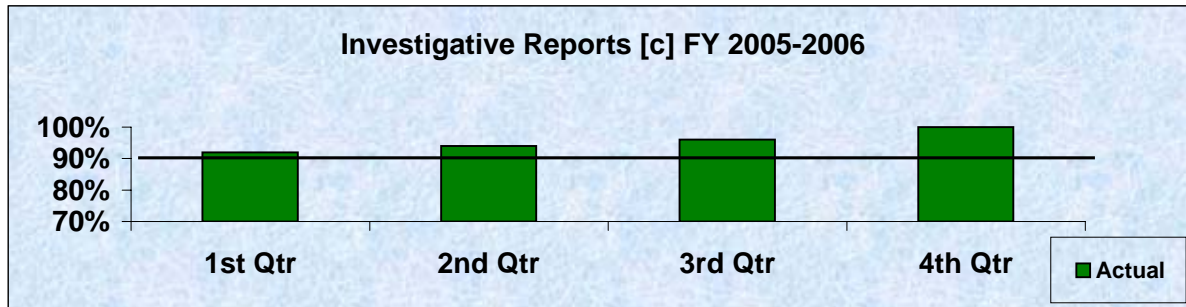
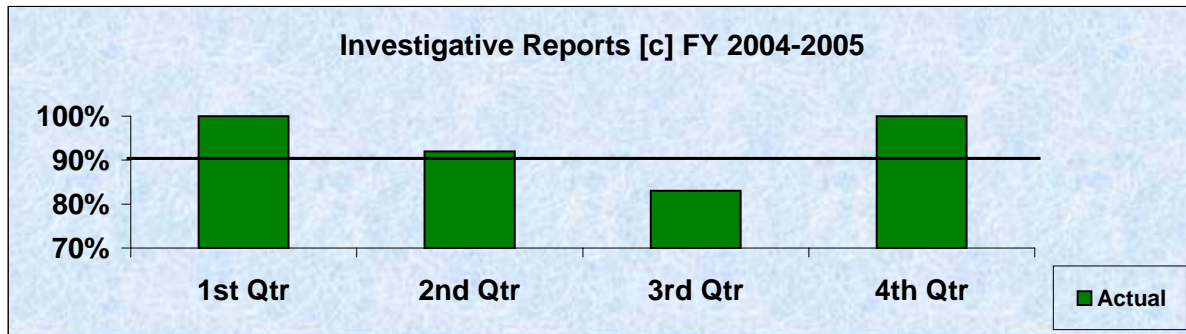
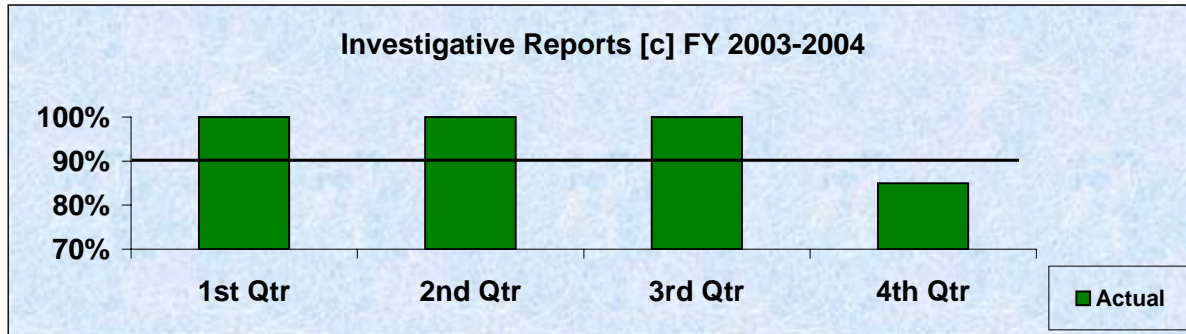
FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Actual	87%	83%	68%	68%	77%
2004-2005	Actual	82%	84%	85%	85%	84%
2005-2006	Actual	78%	73%	61%	57%	67%
	Baseline	70%	70%	70%	70%	70%

FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Paid	430	446	352	351	395
	Total	491	540	516	513	515
2004-2005	Paid	425	381	281	181	317
	Total	519	453	329	212	378
2005-2006	Paid	193	179	214	337	231
	Total	249	245	350	595	360

**CALPERS EFFECTIVENESS MEASURES  
THREE YEAR COMPARISONS  
DISABILITY RETIREMENTS**

**Title:** Disability Validation Team Measurement-Timing Factor [c]  
(measure added to Disability Retirement Section as 2 [c] in FY 1997-98)

**Definition:** Complete surveillance and investigative report for **90%** of the Disability Validation Team (DVT) cases assigned to surveillance within 45 days of such an assignment.



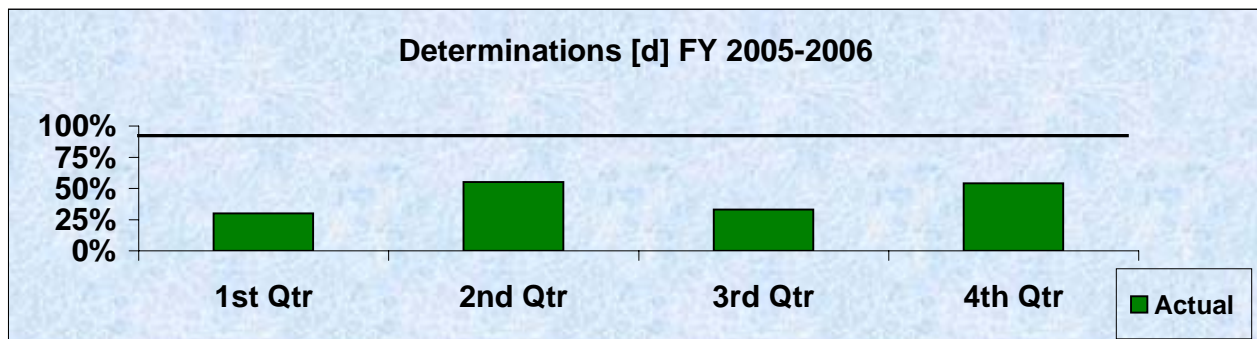
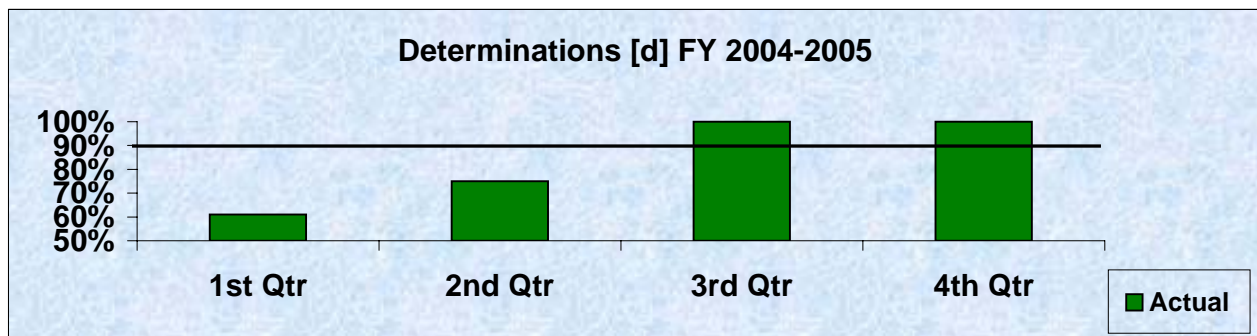
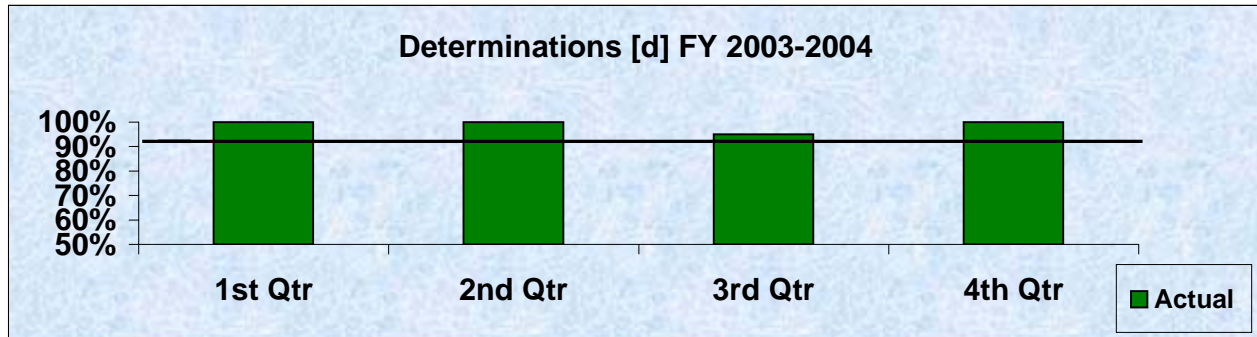
FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Actual	100%	100%	100%	85%	96%
2004-2005	Actual	100%	92%	83%	100%	94%
2005-2006	Actual	92%	94%	96%	100%	96%
	Baseline	90%	90%	90%	90%	90%

FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Complete	6	11	7	17	10
	Total	6	11	7	20	11
2004-2005	Complete	12	12	5	2	8
	Total	12	13	6	2	8
2005-2006	Complete	23	31	23	27	26
	Total	25	33	24	27	27

**CALPERS EFFECTIVENESS MEASURES  
THREE YEAR COMPARISONS  
DISABILITY RETIREMENTS**

**Title:** Disability Validation Team Measurement-Timing Factor [d]  
(measure added to Disability Retirement Section as 2[d] in FY 1997-98)

**Definition:** Make decisions approving or denying disability retirement application for 90% of DVT cases within 30 days of receipt of all information.



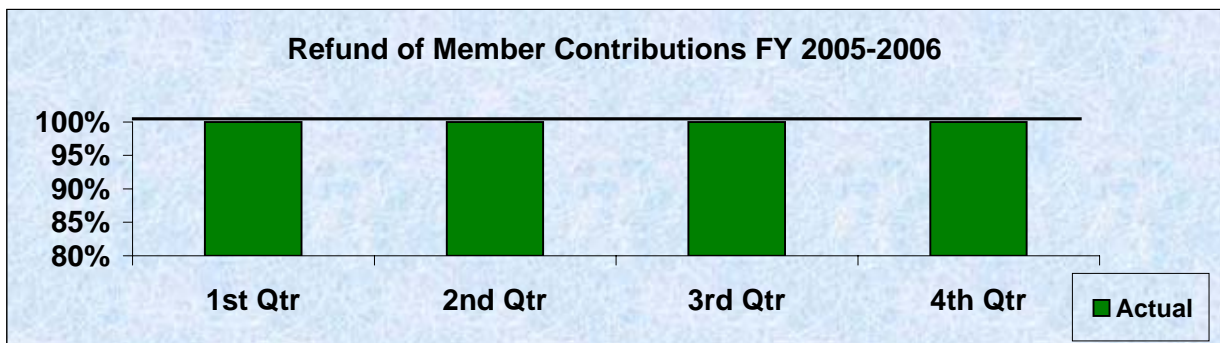
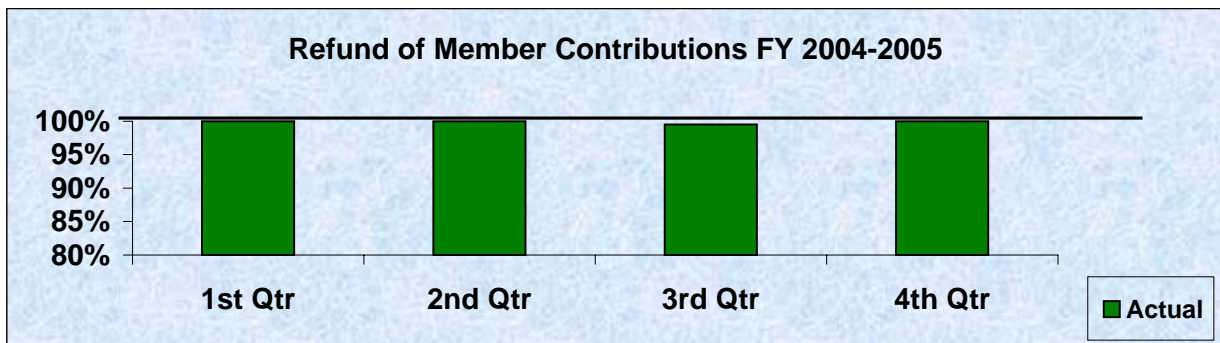
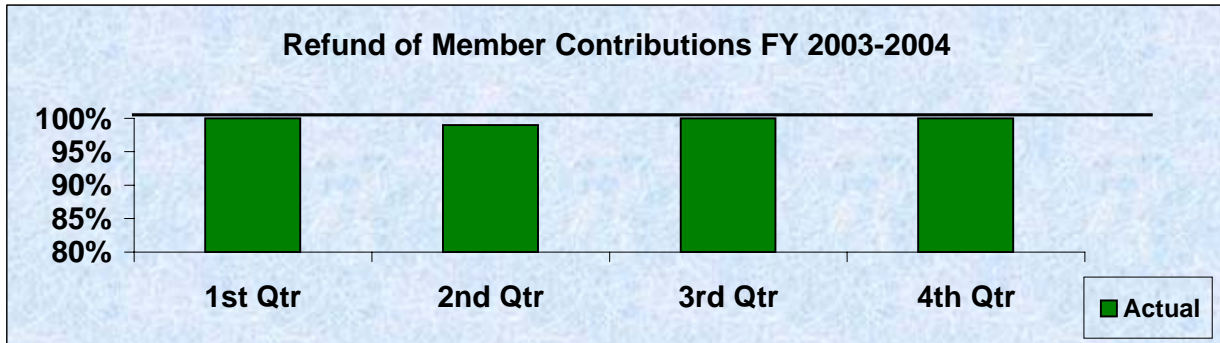
FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Actual	100%	100%	95%	100%	99%
2004-2005	Actual	61%	75%	100%	100%	84%
2005-2006	Actual	30%	55%	33%	54%	43%
	Baseline	90%	90%	90%	90%	90%

FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Made	6	8	18	7	10
	Total	6	8	19	7	10
2004-2005	Made	11	3	2	2	5
	Total	18	4	2	2	7
2005-2006	Made	7	11	8	19	11
	Total	23	20	24	35	25



**CALPERS EFFECTIVENESS MEASURES  
THREE YEAR COMPARISONS  
REFUND OF MEMBER CONTRIBUTIONS**

Title: Refund of Member Contributions  
Definition: Pay **100%** of first refunds to eligible members within 30 calendar days of receipt of valid election.



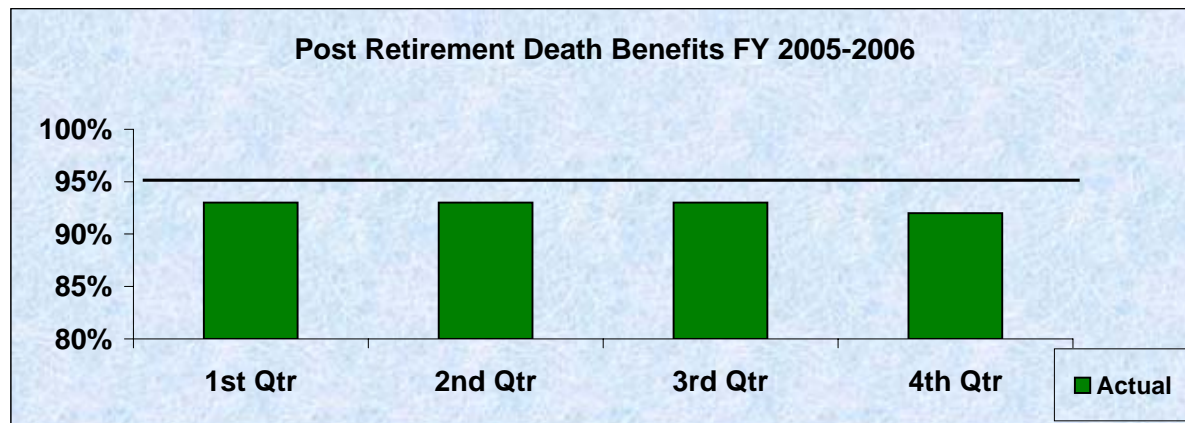
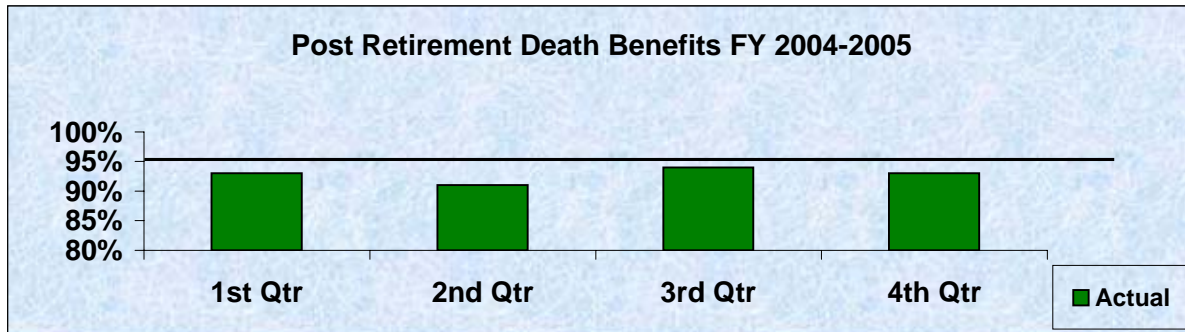
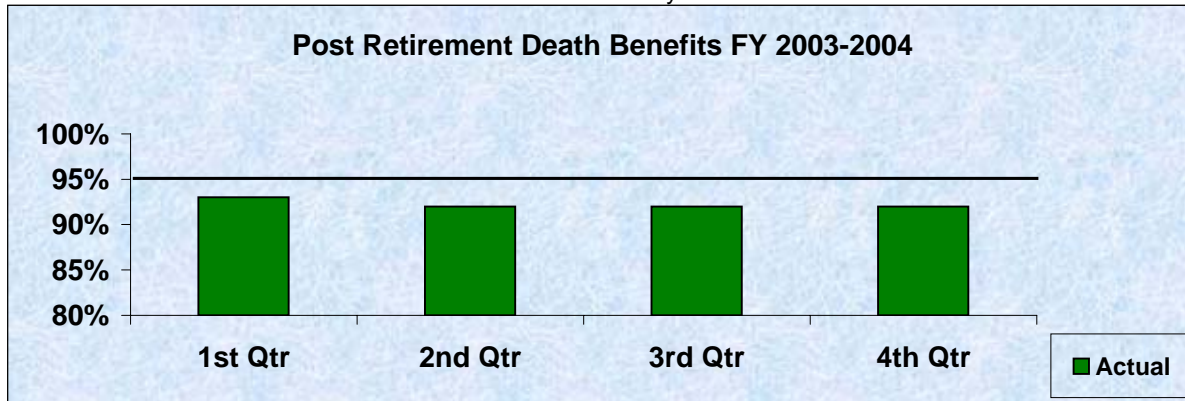
FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Actual	100%	99%	100%	100%	100%
2004-2005	Actual	100%	100%	100%	100%	100%
2005-2006	Actual	100%	100%	100%	100%	100%
	Baseline	100%	100%	100%	100%	100%

FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Paid	3574	4137	5425	3877	4253
	Total	3580	4185	5451	3889	4276
2004-2005	Paid	4241	4338	4819	3867	4316
	Total	4247	4346	4845	3884	4330
2005-2006	Paid	4528	3929	5369	3983	4452
	Total	4548	3934	5386	3986	4464

**CALPERS EFFECTIVENESS MEASURES  
THREE YEAR COMPARISONS  
POST RETIRED DEATH BENEFIT CLAIMS**

Title: **Death Benefits**

Definition: Pay **95%** of post retired death benefit claims to eligible beneficiaries/survivors within 90 calendar days of notification of the death.



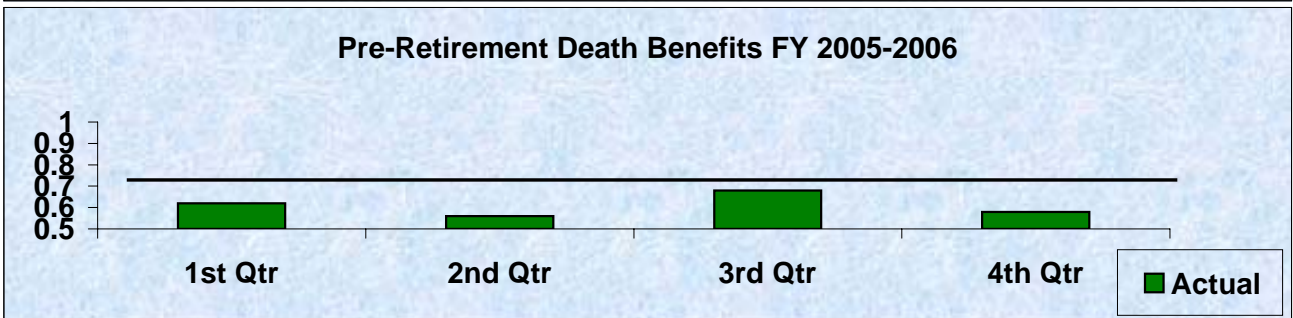
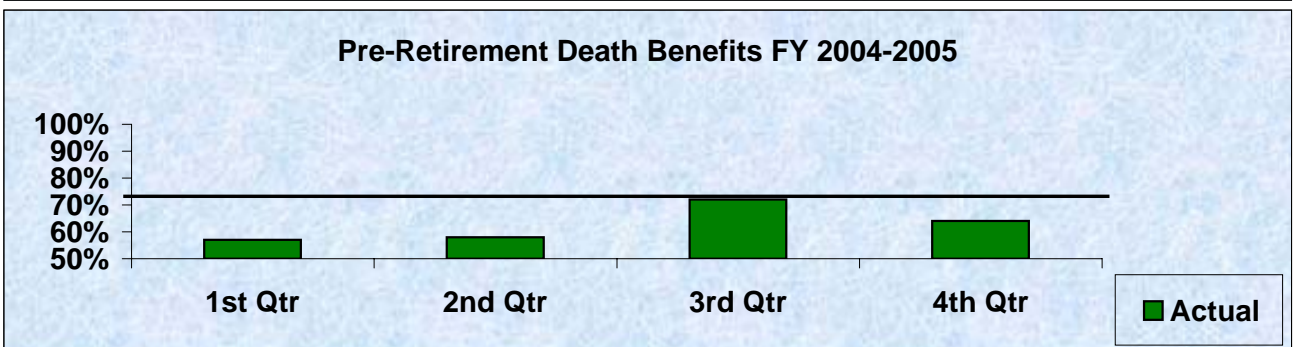
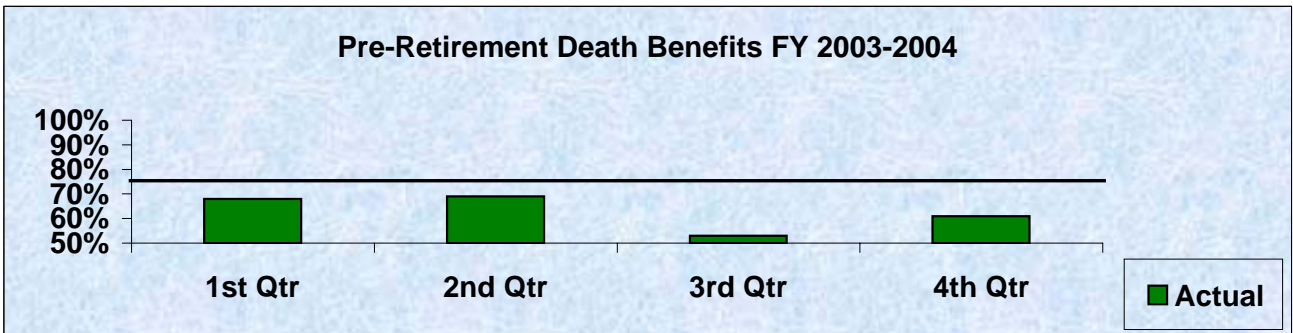
FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Actual	93%	92%	92%	92%	92%
2004-2005	Actual	93%	91%	94%	93%	93%
2005-2006	Actual	93%	93%	93%	92%	93%
	Baseline	95%	95%	95%	95%	95%

FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Paid	1024	956	1295	1061	1084
	Total	1097	1037	1403	1156	1173
2004-2005	Paid	1051	1062	1227	1136	1119
	Total	1136	1165	1308	1228	1209
2005-2006	Paid	1048	1063	1183	1155	1112
	Total	1124	1148	1275	1262	1202

**CALPERS EFFECTIVENESS MEASURES**  
**PRE-RETIREMENT DEATH BENEFIT CLAIMS**

Title: **Death Benefits**

Definition: Pay 75% of pre-retired death benefit claims to eligible beneficiaries/survivors within 90 calendar days of notification of the death.



FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Actual	68%	69%	53%	61%	63%
2004-2005	Actual	57%	58%	72%	64%	63%
2005-2006	Actual	62%	56%	68%	58%	61%
	Baseline	75%	75%	75%	75%	75%

FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2003-2004	Paid	26	25	26	28	26
	Total	38	36	49	46	42
2004-2005	Paid	24	33	36	28	30
	Total	42	57	50	44	48
2005-2006	Paid	31	27	39	28	31
	Total	50	48	57	48	48

**CalPERS EFFECTIVENESS MEASURES  
Member Services Division (MBSD)**

**4<sup>th</sup> QUARTER  
FISCAL YEAR 2005 – 2006**

**Service Costing**

In the Fourth Quarter of Fiscal Year 2005-2006, a total of 10,021 requests were processed. The following items affected the Service Costing Section over the past quarter:

- Backlog Reduction: Cases older than 30-days were the focus of Service Costing staff during Fourth Quarter 2005-2006. The backlog older than 30-days was eliminated except for constraint cases.

**Retirement Estimates**

In the Fourth Quarter of Fiscal Year 2005-2006, which is the highest peak workload period, approximately 9,309 estimates were processed each month. An average of 75% of these estimates was completed within 5 days – a slight decrease over prior quarters due to the increased production associated with the Fourth Quarter peak period and completing the backlog processing. An average of 92% was completed within 30 days.

- Backlog Reduction: Estimate requests older than 30-days were the focus of Estimate Staff during Fourth Quarter 2005-2006. The Estimates backlog was eliminated by May 31, 2006.

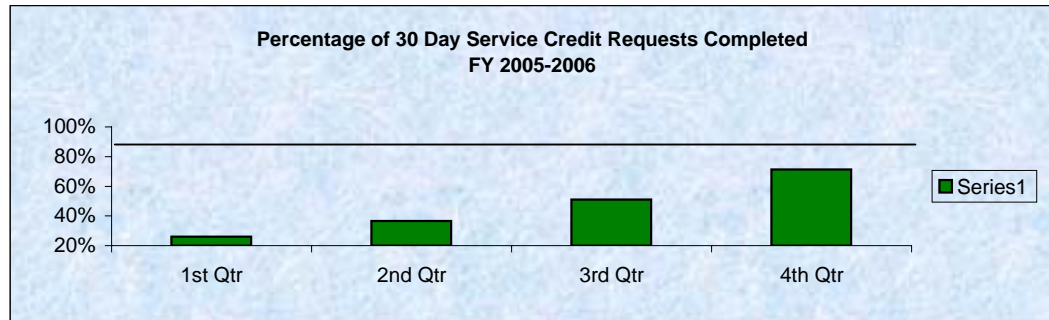


## CALPERS EFFECTIVENESS MEASURES

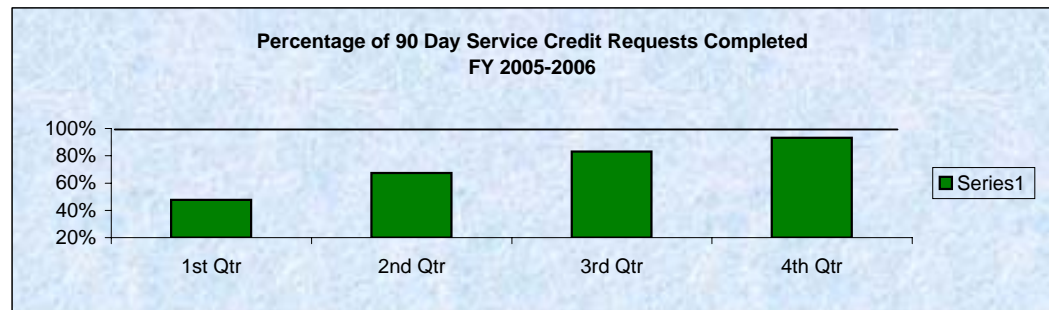
### SERVICE CREDIT PURCHASE COSTING REQUEST

**Title:** Service Credit Purchase Costing Request

**Goal:** 90% of all Service Credit Purchase Costing requests will be completed within 30 days of receipt. The remaining 10% that require payroll compensation intervention will be completed within 90 days of receipt.



FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2002-2003	30 Day Actual	57%	70%	83%	97%	77%
2003-2004	30 Day Actual	96%	68%	47%	38%	62%
2004-2005	30 Day Actual	29%	29%	39%	40%	34%
2005-2006	30 Day Actual	26%	37%	51%	71%	46%
	30 Day Baseline	90%	90%	90%	90%	90%



FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2002-2003	90 Day Actual	80%	82%	84%	94%	85%
2003-2004	90 Day Actual	99%	98%	77%	60%	84%
2004-2005	90 Day Actual	67%	31%	66%	62%	57%
2005-2006	90 Day Actual	48%	67%	83%	93%	73%
	90 Day Baseline	100%	100%	100%	100%	100%

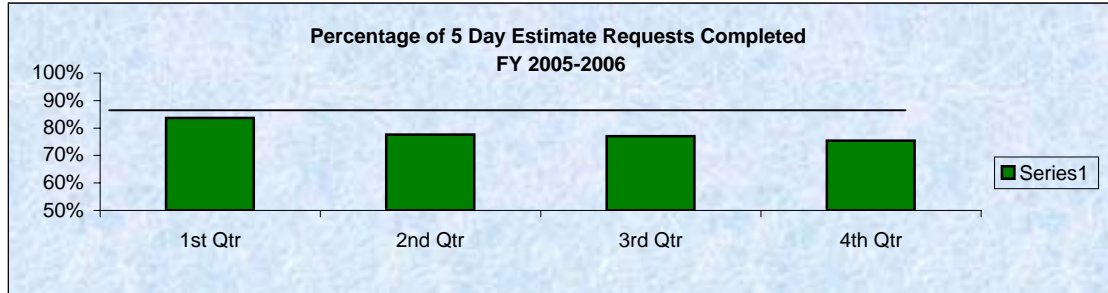
FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2004-2005	Combined	13,696	21,086	18,118	10,954	15,964
	Processed in 30 Days	3,955	6,219	7,302	4,408	5,471
	Processed in 90 Days	550	383	5,681	2,311	2,231
	Processed > 90 Days	9,191	14,484	5,135	4,235	8,261
2005-2006	Combined	12,379	12,441	11,602	10,021	11,611
	Processed in 30 Days	3,194	4,507	5,943	7,151	5,199
	Processed in 90 Days	2,723	3,880	3,719	2,185	3,127
	Processed > 90 Days	6,462	4,054	1,940	685	3,285

## CALPERS EFFECTIVENESS MEASURES

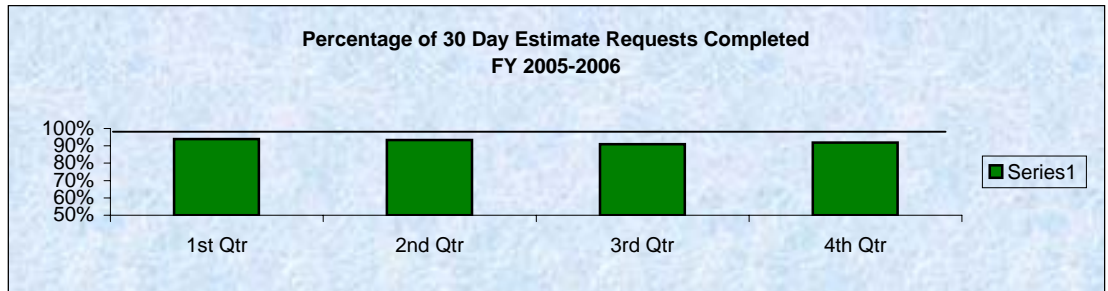
### SERVICE CREDIT PURCHASE COSTING REQUEST

Title: Retirement Estimates

Goal: 90% of all requests for retirement estimates will be completed within 5 days of receipt. The remaining 10% that require manual calculation will be completed within 30 days of receipt.



FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2002-2003	5 Day Actual	82%	85%	90%	90%	87%
2003-2004	5 Day Actual	86%	91%	90%	81%	87%
2004-2005	5 Day Actual	84%	78%	83%	79%	81%
2005-2006	5 Day Actual	84%	78%	77%	75%	78%
	5 Day Baseline	90%	90%	90%	90%	90%



FY	Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2002-2003	30 Day Actual	94%	99%	99%	97%	97%
2003-2004	30 Day Actual	94%	99%	98%	93%	96%
2004-2005	30 Day Actual	89%	85%	95%	91%	90%
2005-2006	30 Day Actual	94%	93%	91%	92%	93%
	30 Day Baseline	100%	100%	100%	100%	100%

FY	Counts	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr	Cum. Avg.
2004-2005	Combined Total	24,688	22,253	23,782	28,003	24,682
	Processed in 5 Days	20,759	17,463	19,858	21,996	20,019
	Processed in 30 Days	1,281	1,472	2,653	3,380	2,197
	Processed >30 Days	2,648	3,318	1,271	2,627	2,466
2005-2006	Combined Total	25,502	22,655	24,456	27,928	25,135
	Processed in 5 Days	21,351	17,590	18,909	21,067	19,729
	Processed in 30 Days	2,682	3,557	3,290	4,611	3,535
	Processed >30 Days	1,469	1,508	2,257	2,250	1,871

## Customer Service and Education Division (CSED)

Report Period: March 2006

### CalPERS EFFECTIVENESS MEASURES

Telephones  
4<sup>th</sup> Quarter  
2005 - 2006

#### Measurements

The CalPERS Customer Service and Education Division (CSED) received 181,503 calls in the 4<sup>th</sup> quarter. This represents an 18% decrease in calls over the 3<sup>rd</sup> quarter, resulting in a 19% increase in the call answer rate.

The following is a comparison between the 3<sup>rd</sup> and 4<sup>th</sup> quarters of 2006 and a rollup of the Fiscal Year 2005 - 2006:

	3 <sup>rd</sup> Quarter	4 <sup>th</sup> Quarter	YTD
• Calls Received	<b>221,752</b>	<b>181,503</b>	<b>792,842</b>
• Average Queue Time	<b>13:41</b>	<b>5:55</b>	<b>9:46</b>
• Call Answer Rate	<b>68%</b>	<b>87%</b>	<b>76%</b>
• Call Closure Rate	<b>90%</b>	<b>88%</b>	<b>89%</b>
• Call Abandon Rate	<b>32%</b>	<b>13%</b>	<b>24%</b>

The CSED anticipates continued improvement as all phone agent positions have been filled and additional student assistants have been hired. The new phone staff will be online by July 31<sup>st</sup>, 2006.

## Customer Service and Education Division (CSED)

### Enterprise Contact Center

Report Period: Jun-06

### Goals and Objectives

	Calls Offered	Calls Answered	Calls Abandoned	Calls Closed	IE
<b>Month</b>	58,511	53,818	4,693	47,010	6,808
<b>YTD</b>	792,842	605,192	187,650	536,803	68,389

	Monthly Average	Time	Goal
<b>Month</b>	Queue Time	4:33	<b>2:30</b>
<b>YTD</b>	Queue Time	9:46	<b>2:30</b>

Monthly Average	%	Goal	YTD %
Call Answer Rate	92%	<b>95%</b>	76%
Call Closure Rate	87%	<b>95%</b>	89%
Call Abandoned Rate	8%	<b>2% - 7%</b>	24%

#### **How Monthly Averages are Calculated**

Call Answer Rate:	Calls Answered	÷	Calls Offered	= %
Closure Rate:	Calls Closed	÷	Calls Answered	= %
Abandoned Rate:	Calls Abandoned	÷	Calls Offered	= %



## Customer Service and Education Division (CSED)

### Enterprise Contact Center

Report Period: 4th Qtr 2005-2006

### Goals and Objectives

	Calls Offered	Calls Answered	Calls Abandoned	Calls Closed	IE
<b>QTR 4</b>	181,503	158,390	23,113	140,152	18,238

	Monthly Average	Time	Goal
<b>QTR 4</b>	Queue Time	5:55	<b>2:30</b>

Monthly Average	%	Goal
Call Answer Rate	87%	<b>95%</b>
Call Closure Rate	88%	<b>95%</b>
Call Abandoned Rate	13%	<b>2% - 7%</b>

#### How Monthly Averages are Calculated

Call Answer Rate:	Calls Answered	÷	Calls Offered	= %
Closure Rate:	Calls Closed	÷	Calls Answered	= %
Abandoned Rate:	Calls Abandoned	÷	Calls Offered	= %

## Customer Service and Education Division (CSED)

Enterprise Fiscal

2005-2006

	Calls Offered	Calls Answered	Calls Abandoned	Calls Closed	IE'S	Average Queue Time	Call Answer Rate	Call Closure Rate	Call Abandoned Rate
July	58,002	47,157	10,845	40,787	6,370	8:43	81%	86%	19%
August	74,125	54,198	19,811	46,482	7,716	11:25	73%	86%	27%
September	71,816	51,003	20,813	43,766	7,237	12:18	71%	86%	29%
October	61,995	51,777	10,218	44,420	7,357	7:14	84%	86%	16%
November	66,262	48,355	17,907	43,734	4,621	10:35	73%	90%	27%
December	57,387	44,132	13,255	42,369	1,763	9:41	77%	96%	23%
January	77,640	50,811	26,829	45,189	5,622	14:42	65%	89%	35%
February	73,806	43,948	29,858	38,932	5,016	16:46	60%	89%	40%
March	70,306	55,421	14,885	50,972	4,449	9:35	79%	92%	21%
April	62,507	51,022	11,485	46,441	4,581	7:58	82%	91%	18%
May	60,485	53,550	6,935	46,701	6,849	5:16	89%	87%	11%
June	58,511	53,818	4,693	47,010	6,808	4:33	92%	87%	8%
Total	792,842	605,192	187,534	536,803	68,389	9:46	76%	89%	24%

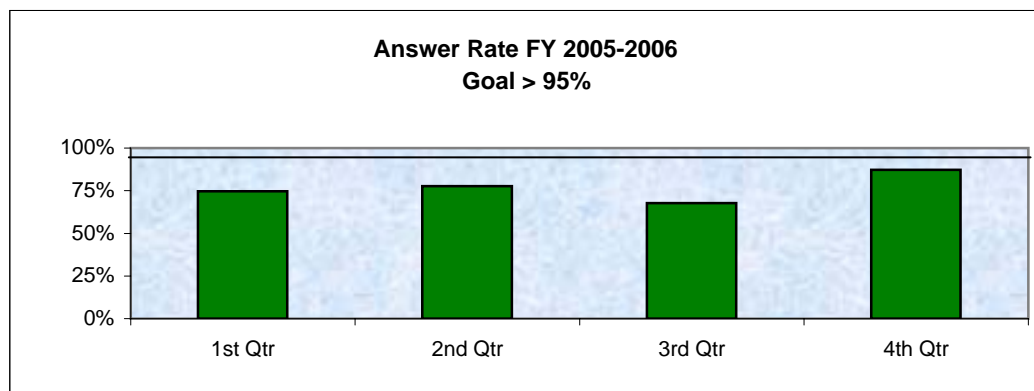
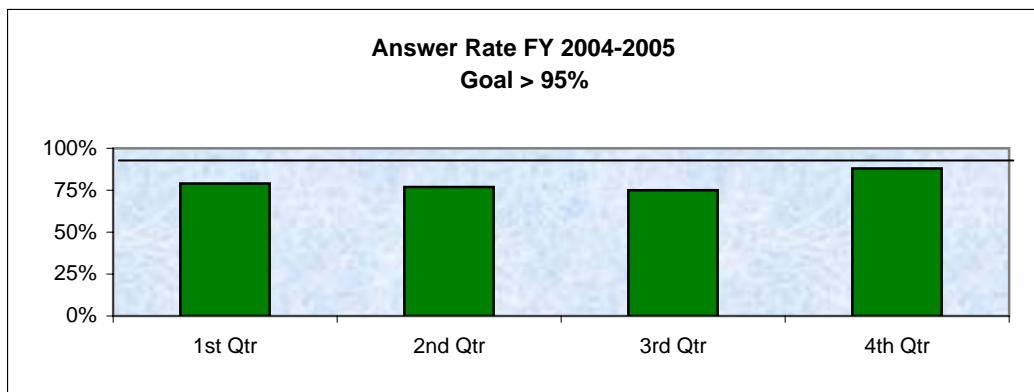
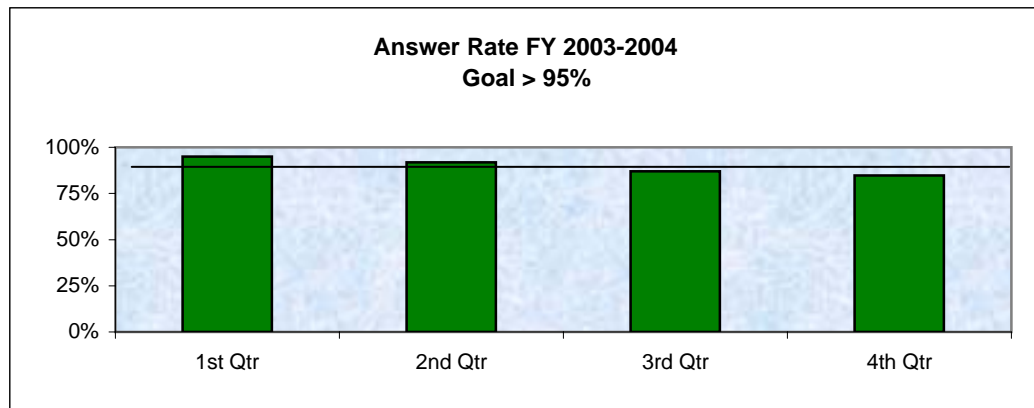
# Customer Service and Education Division (CSED)

## CALPERS EFFECTIVENESS MEASURES

### TELEPHONE CALLS - ANSWER RATE

Title: **Answer Rate**

Goal: FY 2003-04: Answer 95% of calls received  
 FY 2004-05: Answer 95% of calls received  
 FY 2005-06: Answer 95% of calls received



FY	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
2003-2004	95%	92%	87%	85%
2004-2005	79%	77%	75%	88%
2005-2006	75%	78%	68%	87%

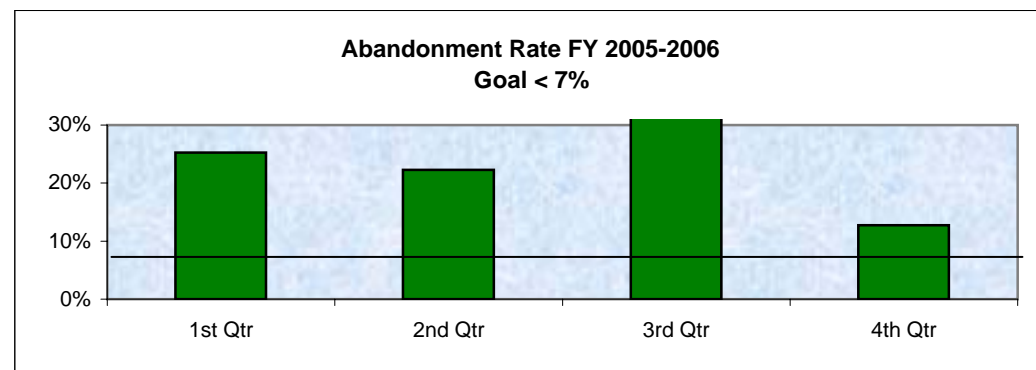
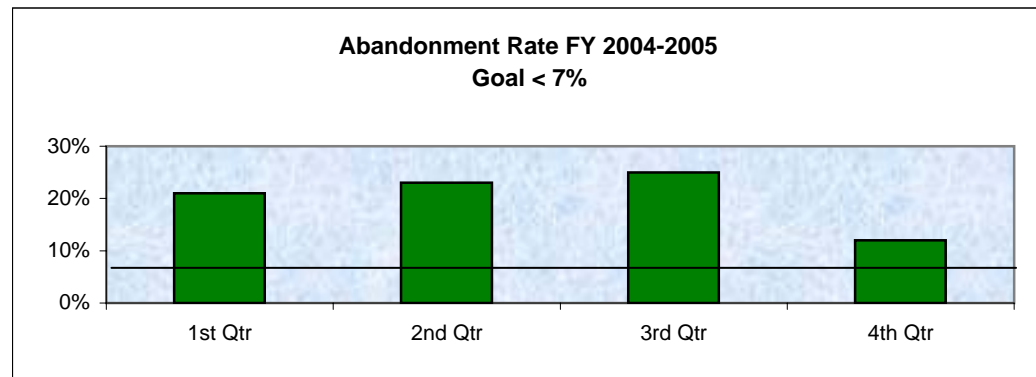
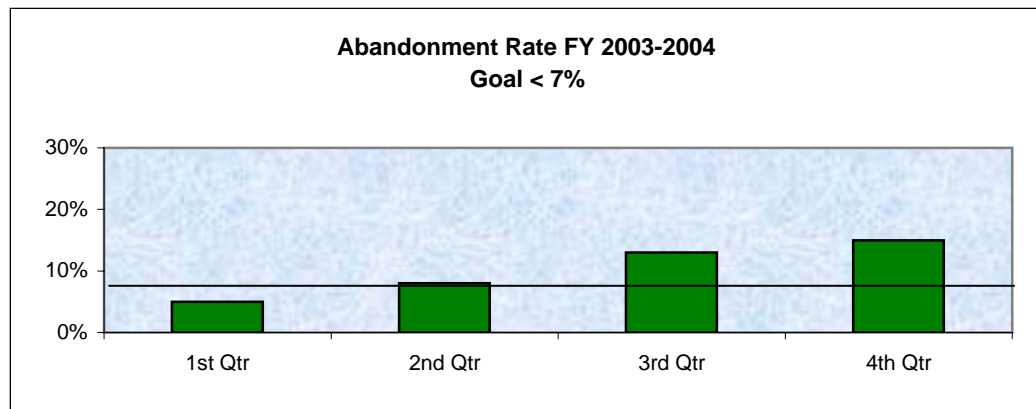
## Customer Service and Education Division (CSED)

### CALPERS EFFECTIVENESS MEASURES

#### TELEPHONE CALLS - ABANDONMENT RATE

Title: **Abandonment Rate**

Goal: FY 2003-04: Monthly call volumes of 70,000 or less, no more than 2%  
 Monthly call volumes of 70,000 or more, no more than 7%  
 FY 2004-05: Monthly call volumes of 70,000 or less, no more than 2%  
 Monthly call volumes of 70,000 or more, no more than 7%  
 FY 2005-06: Monthly call volumes of 70,000 or less, no more than 2%  
 Monthly call volumes of 70,000 or more, no more than 7%



FY	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
2003-2004	5%	8%	13%	15%
2004-2005	21%	23%	25%	12%
2005-2006	25%	22%	32%	13%



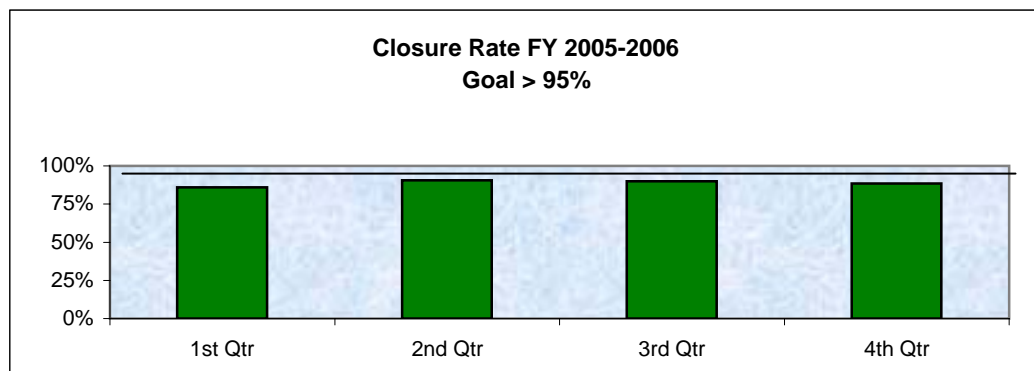
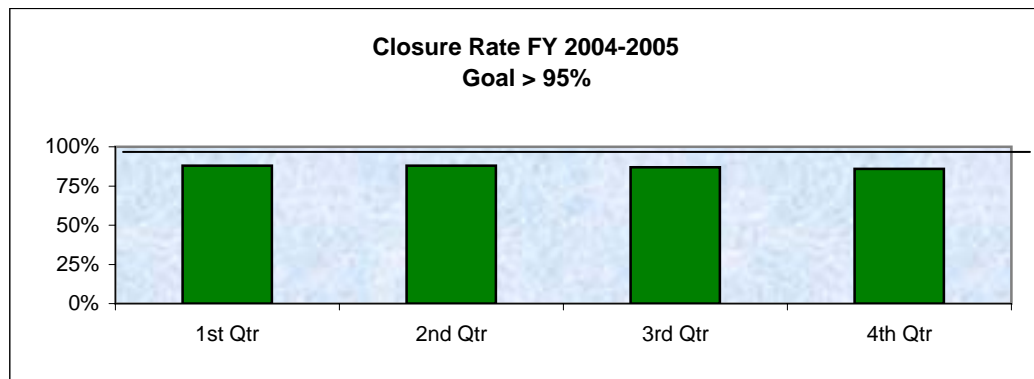
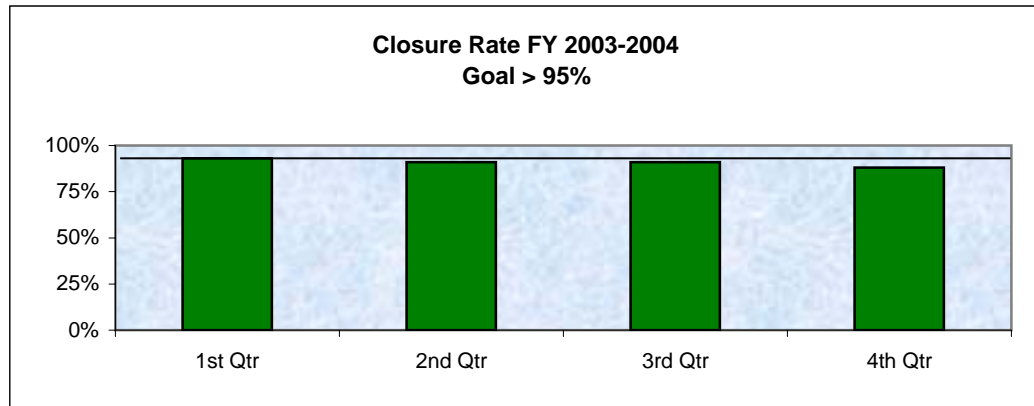
## Customer Service and Education Division (CSED)

### CALPERS EFFECTIVENESS MEASURES

#### TELEPHONE CALLS - CLOSURE RATE

Title:      **Closure Rate**

Goal:      FY 2003-04: Close 95% of the calls received on the first point of contact  
 FY 2004-05: Close 95% of the calls received on the first point of contact  
 FY 2005-06: Close 95% of the calls received on the first point of contact



FY	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
2003-2004	93%	91%	91%	88%
2004-2005	88%	88%	87%	86%
2005-2006	86%	90%	90%	88%

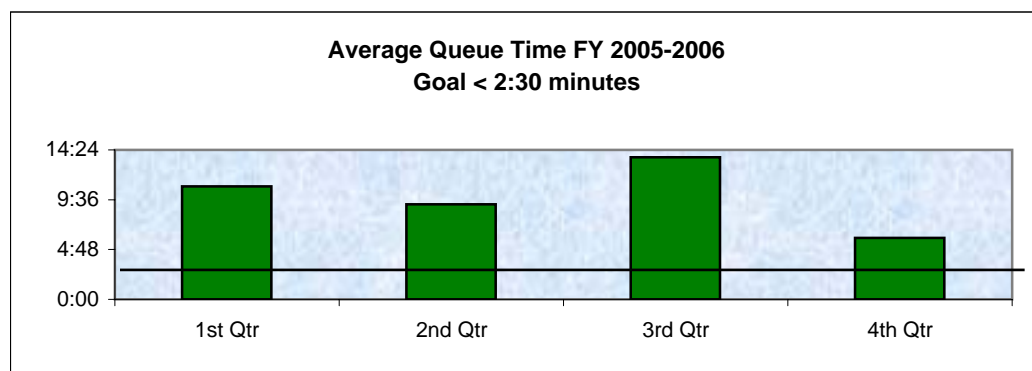
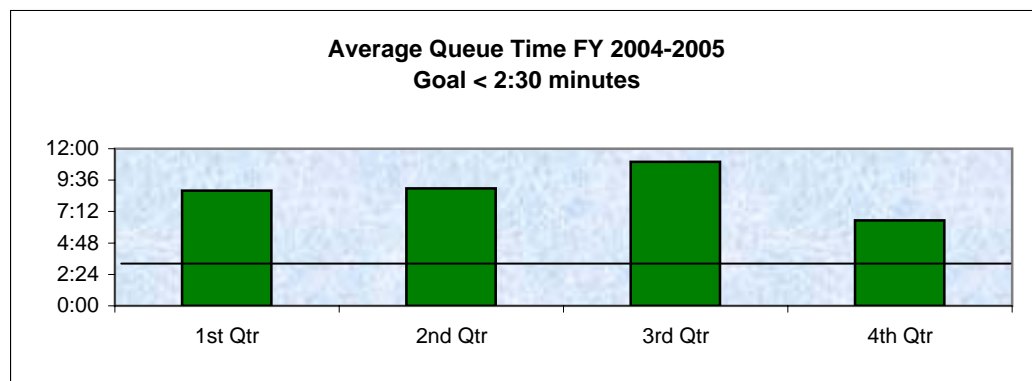
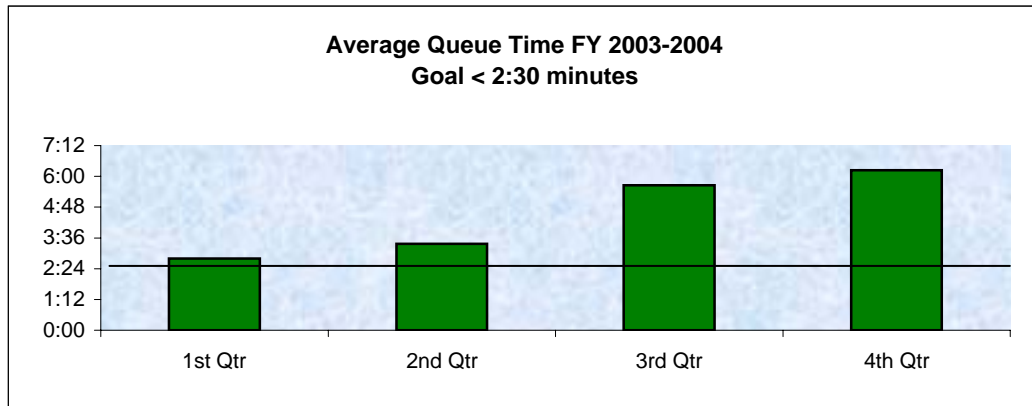
# Customer Service and Education Division (CSED)

## CALPERS EFFECTIVENESS MEASURES

### TELEPHONE CALLS - AVERAGE QUEUE TIME

Title:      **Average Queue Time**

Goal:      FY 2003-04: Average Queue Time < 2:30 minutes  
 FY 2004-05: Average Queue Time < 2:30 minutes  
 FY 2005-06: Average Queue Time < 2:30 minutes



FY	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
2003-2004	2:48	3:22	5:39	6:14
2004-2005	8:48	8:58	11:00	6:32
2005-2006	10:52	9:10	13:41	5:55

## Customer Service and Education Division (CSED)

### CalPERS EFFECTIVENESS MEASURES

Workflow  
4<sup>th</sup> Quarter  
2005 – 2006

#### Measurements

#### **Correspondence:**

The CalPERS Customer Service and Education Division (CSED) received 4,928 units of correspondence in the 4<sup>th</sup> quarter of Fiscal Year 2005 - 2006.

The following is a comparison between the 3<sup>rd</sup> and 4<sup>th</sup> quarters of Fiscal Year 2005 – 2006:

	<b>3<sup>rd</sup> Quarter</b>	<b>4<sup>th</sup> Quarter</b>	<b>YTD</b>
• Completed at initial point of contact:	<b>62%</b>	<b>52%</b>	<b>59%</b>
• Completed within 5 business days:	<b>92%</b>	<b>92%</b>	<b>92%</b>
• Completed within 10 business days:	<b>99%</b>	<b>97%</b>	<b>98%</b>

#### **E-Mail:**

The CalPERS Customer Service and Education Division (CSED) received 8,014 units of e-mail in the 4<sup>th</sup> quarter of Fiscal Year 2005 - 2006.

The following is a comparison between the 3<sup>rd</sup> and 4<sup>th</sup> quarters of Fiscal Year 2005 – 2006:

	<b>3<sup>rd</sup> Quarter</b>	<b>4<sup>th</sup> Quarter</b>	<b>YTD</b>
• Completed at initial point of contact:	<b>64%</b>	<b>57%</b>	<b>60%</b>
• Completed within 5 business days:	<b>88%</b>	<b>85%</b>	<b>88%</b>
• Completed within 10 business days:	<b>100%</b>	<b>100%</b>	<b>97%</b>

The CSED created a specific unit to address correspondence and e-mail workloads at the beginning of the 4<sup>th</sup> quarter. Improvement is anticipated in all measured areas as the unit gains experience and resources are matched to workload.

## Enterprise Contact Center

WORKFLOW: June 2006

## Goals and Objectives

Email	Received	Completed	% Completed at Initial Point of contact	% Completed within 5 Days	Number completed within 5 days	% Completed within 10 Days	# Completed within 10 days
Month	2,601	1,474	57%	100%	1,472	100%	1,473
YTD	34,778	20,818	60%	88%	18,384	97%	20,096
Goal			75%	80%		100%	

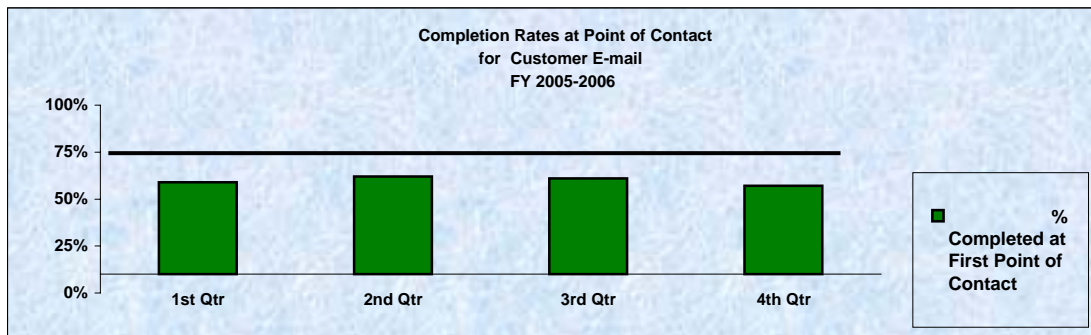
Correspondence	Received	Completed	% Completed at Initial Point of contact	% Completed within 5 Days	Number completed within 5 days	% Completed within 10 Days	# Completed within 10 days
Month	1,605	830	52%	98%	815	99%	825
YTD	22,177	13,077	59%	91%	11,951	98%	12,768
Goal			60%	80%		100%	



## Customer Service and Education Division (CSED)

Title: E-mail

Goal: FY 2005-2006: 75% of all customer e-mail inquiries will be completed at the first point of contact.  
80% of customer based e-mail completed at the initial point of contact will be completed within 5 business days.



### FY 2005-2006

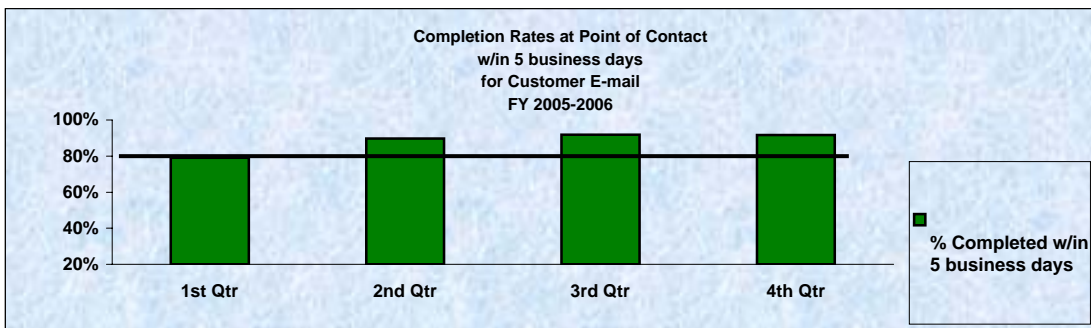
#### % Completed at First Point of Contact

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Actual	59%	62%	61%	57%
Baseline	75%	75%	75%	75%

### FY 2005-2006

#### Amount of Email Received/Completed

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Received	8,620	8,060	10,084	8,014
Completed	5,086	5,036	6,173	4,548



### FY 2005-2006

#### % Completed w/in 5 business days

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Actual	79%	90%	92%	92%
Baseline	80%	80%	80%	80%

### FY 2005-2006

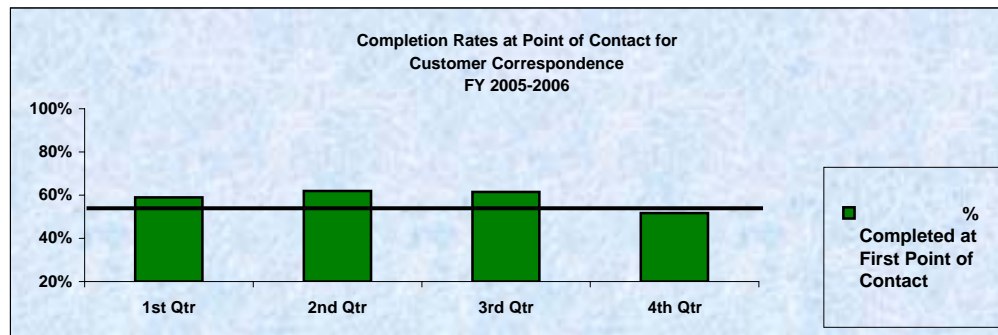
#### Amount of Email Completed w/in 5 Business Days

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Actual	4,018	4,524	5,668	4,174

## Customer Service and Education Division (CSED)

Title:       **Correspondence**

Goal:       FY 2005-2006: 60% of all customer correspondence inquiries will be completed at the first point of contact. 80% of customer based correspondence completed at the initial point of contact will be completed within 5 business days.



### FY 2005-2006

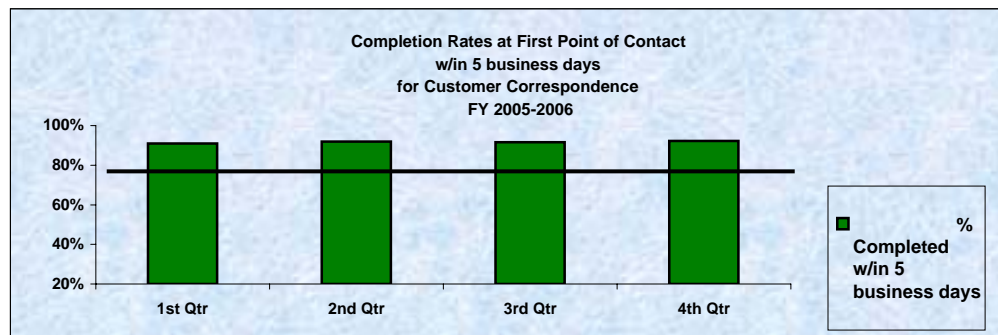
#### % Completed at First Point of Contact

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
<i>Actual</i>	59%	62%	62%	52%
<i>Baseline</i>	60%	60%	60%	<b>60%</b>

### FY 2005-2006

#### Amount of Correspondence Received/Completed

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
<i>Received</i>	5,958	5,088	6,203	4,928
<i>Completed</i>	3,515	3,184	3,818	2,550



### FY 2005-2006

#### % Completed w/in 5 business days

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
<i>Actual</i>	91%	92%	92%	92%
<i>Baseline</i>	<b>80%</b>	<b>80%</b>	<b>80%</b>	<b>80%</b>

### FY 2005-2006

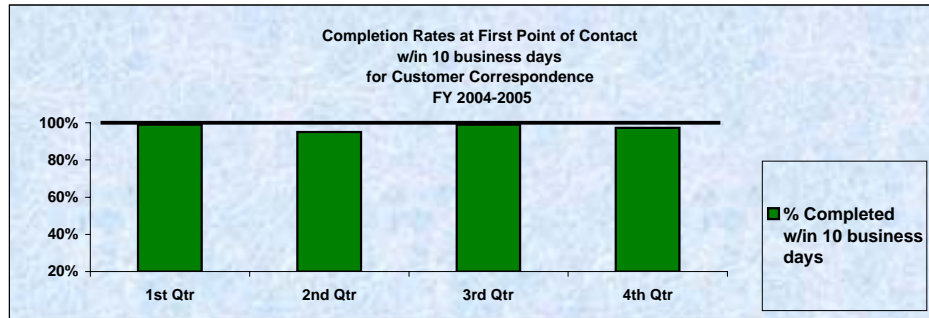
#### Amount of Correspondence Completed w/in 5 Business Days

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
<i>Actual</i>	3199	2930	3500	2354

## Customer Service and Education Division (CSED)

Title: **Correspondence**

Goal: FY 2005-2006: 100% within 10 working days.



**FY 2005-2006**  
% Completed w/in 10 business days

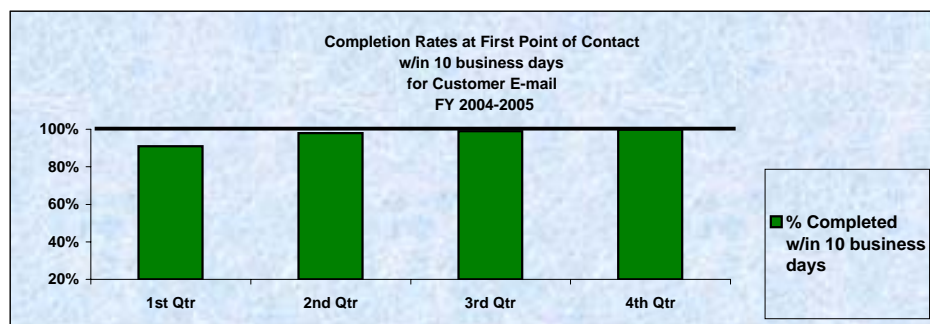
Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
<i>Actual</i>	99%	95%	99%	97%
<i>Baseline</i>	100%	100%	100%	100%

**FY 2005-2006**  
Amount of Correspondence Completed w/in 10 Business Days

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
<i>Actual</i>	3480	3013	3780	2483

Title: **E-mail**

Goal: FY 2004-05: 100% within 10 working days.



**FY 2005-2006**  
% Completed w/in 10 business days

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
<i>Actual</i>	91%	98%	99%	100%
<i>Baseline</i>	100%	100%	100%	100%

**FY 2005-2006**  
Amount of E-mail Completed w/in 10 Business Days

Period	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
<i>Actual</i>	4628	4938	6116	4541